Better Marketing
Division of Marketing and Marketing Agreements
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FACTORS IN DAIRYING CONTINUE FAVORABLE

Various Production and Demand Factors Help Maintain Improved Situation For Milk Producers

An improved demand for dairy products and more favorable factors of production are among the highlights of the situation in the dairy industry.

Milk cow numbers are now estimated at about 2 percent smaller than a year ago and 5 percent smaller than at this time in 1934 but about in line with the long-time upward trend, according to the Dairy Section. There appear to be about enough heifers on hand to offset at least an average rate of culling. A marked change in milk cow numbers during the next year does not seem probable.

An important factor in dairying is the feed situation in relation to livestock numbers. Total livestock numbers on January 1, 1936, in terms of grain-consuming animal units, were somewhat larger than a year earlier, but were about 10 percent below the 1929–33 average. With a probable substantial increase in the 1936 pig crops, an increase in grain-consuming animal units during 1936 appears likely. The number of hay- and pasture-consuming animal units on January 1 was somewhat smaller than a year earlier but about 4 percent above the 1928–32 average.

Feed Prices Favorable

The apparent utilization of feedstuffs in relation to livestock numbers indicates that feeding during the 1935–36 season has been substantially more liberal than in 1934–35, but slightly below the 1928–32 average. Current supplies of feed grains and hay are relatively large. Feed prices have been substantially lower this winter than last winter. Current wholesale feedstuff prices are about 71 percent of the 1926 level or about the same as 2 years ago as compared with 104 percent a year ago.

Planting intentions reported by farmers to the Department of Agriculture on March 1 indicated that, with average growing conditions, the total 1936–37 supply of feed grains would be much larger than the 1935–36 supply and above average per animal unit. The intentions indicated about average hay and forage crops this year. With these feed supplies, prices of feed grains produced in 1936 probably would be relatively low in comparison to 1935, and particularly favorable to the production of meat animals. However, the March 1 intentions were given before the agricultural-conservation program was announced, and

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California Fruit Marketing Agreement Program in Effect

A marketing agreement and order for handlers of fresh California Bartlett pears and fall and winter pears, plums, and Elberta peaches became effective May 25. The program is designed to adjust shipments of these fruits more nearly in accordance with market requirements, so that returns to growers may be maintained or increased.

As approved by the Secretary of Agriculture, the marketing agreement was signed by handlers representing more than 50 percent of the shipments, during the last 2 years, of each of the fruits included in the program. The order, which embodies the provisions of the agreement, was issued by the Secretary after determining that it was favored by producers of more than two-thirds of the volume of fruit involved.

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BOSTON MILK ORDER DECISION AWAITED

Hearing in Federal District Court on May 22 Brings Out Issues Involved in Milk Order Case

A decision on whether the Federal Government will be granted a preliminary injunction against 28 milk handlers alleged to have violated the provisions of the order for the Boston, Mass., milk-marketing area, is now pending in the Federal district court in Boston where a hearing on the bill of complaint was held May 22.

As pointed out by the court, the issues in the case involve, among other things, the constitutionality of the marketing agreement and order provisions of the Agricultural Adjustment Act as amended last August, and whether the Supreme Court's decision of January 6 in the Hoosac Mills case also affected the marketing agreement and order provisions.

Counsel for the Government pointed out to the court that the original Agricultural Adjustment Act provided for two distinct types of programs. One was for production control through the payment of benefit payments derived from processing taxes. The other type of program involved marketing agreements and orders. The Hoosac Mills case, it was argued, only concerned the processing-tax and production-control features of the act. In addition, the section of the act which provides for the separability of its provisions saved the marketing agreement and order provisions from the

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EXPORT SALES BIG ITEM TO U. S. FRUIT GROWERS

Improved Foreign Outlets To Become More Vital to Producers as Fruit Production Mounts

Fresh and dried fruits comprise approximately one-fourth of the value of United States exports of agricultural commodities exclusive of cotton and tobacco. In contrast with most other agricultural products, the trend of fruit exports from the United States has been definitely upward during the post-war years. This trend has been due to a marked increase in the commercial fruit production in this country and to increasing demand in foreign countries. Trade barriers in foreign markets have increased greatly since 1929, but the volume of fresh and dried fruit exports has been maintained at a relatively higher level, although the potential market abroad has not been realized.

Fruit exports in fresh and dried form increased from an average of approximately 511,000 tons during the 4 years ended June 1926, to an annual average of 862,000 tons during the following 5 years, an increase of over 68 percent. Following 1930–31 the volume of these commodities exported declined gradually although the average for the past 4 years was 726,000 tons, or 84 percent of the average annual exports for the previous 5 years, but 42 percent above the 1922–23 to 1925–26 average.

Value and Volume

The value of fresh and dried fruit exports from the United States has followed the same general course of change during the past 15 years as has the volume of exports. The average annual value of these exports for the 1921–22 to 1925–26 period amounted to slightly over $60,600,000, and increased to $94,700,000 during the next 5 years, a gain of 58 percent. Subsequent to the peak of $116,539,000 which occurred in 1928–29, the export value of fresh and dried fruits declined to about $52,650,000 in 1934–35. The average for the past 4 years amounted to $58,526,000, a decline of 38 percent from the 1926–27 to 1930–31 level, and a 4-percent decline from the 1921–22 to 1925–26 average.

The annual volume of all agricultural exports during the period 1926–27 to 1930–31 averaged about 6 percent less than the yearly exports during the 5 years 1921–22 to 1925–26. From 1931–32 through 1934–35 the total volume amounted to only 68 percent of annual exports during the earlier 5 years.

In terms of value, all agricultural exports exceeded 2 billion dollars annually

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BETTER MARKETING is issued as a means of communicating to workers and cooperators of the Division of Marketing and Marketing Agreements information relative to the Division's activities under the Agricultural Adjustment Act and related Acts.

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AGRICULTURAL ADJUSTMENT ADMINISTRATION
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EXPORT SALES

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during the period 1921–22 to 1925–26. The annual value for the next 5 years was approximately 13 percent less and for the 5 years ended in June 1935 averaged $765,000,000, or 38 percent of the 1921–22 to 1925–26 average as compared to 96 percent in the case of fresh and dried fruit exports.

Exports Widely Distributed

While United States fruit exports are distributed widely to countries throughout the world, Canada, the United Kingdom, Germany, France, and the other northern European countries have been the principal foreign markets. The importance of these countries as outlets for United States fruit is indicated by the fact that during recent years they have received approximately 85 percent of the dried-fruit exports and over 95 percent of the fresh-fruit exports.

The chief importing countries of American-grown fruit, it should be noted were also the countries most aggressive in erecting trade barriers following 1929. Increased duties, import regulations in the form of licenses and sanitary inspection, quotas and exchange restrictions have proven serious obstacles to producers in this country seeking an outlet for a part of their increased supply of fruit products in foreign markets.

The importance of the export market to producers in this country varies considerably among the major fruit crops. Dried-raisin exports have averaged between 25 to 30 percent, and dried-prune exports have comprised from 42 to 52 percent of season total shipments during recent years. Exports of fresh apples have varied from 11 to 20 percent of the commercial crop, whereas exports of oranges have varied between 7 and 10 percent, and grapefruit exports slightly less than 10 percent of season-total marketings.

More Outlets Needed

With indications that total fruit production in the United States will probably continue to increase for a number of years, maintenance and expansion of foreign outlets will become even more significant to producers in this country if they are to market the larger output at fair prices and returns.

The fact that a relatively heavy volume of fresh and dried fruit exports has continued in recent years is explained in large measure by the decline in fruit prices in the United States, to which foreign trade restrictions have contributed by forcing a larger proportion of the total production on the domestic market. The nature of orchard industries is such as to make impractical a quick readjustment of production to changing demand conditions, with the result that during recent years of reduced demand, marketing of the large crops, and in certain instances increasingly large crops, proved a distinctly depressive factor on prices to growers. However, continuation of a favorable demand on the part of foreign consumers for American grown fruit, in spite of certain types of trade barriers, has been a very important factor in maintaining fruit exports from this country.

From the long-time standpoint, producers in this country should take into account that many of the European countries are making rapid progress in improving and expanding their fruit industries which can be expected to result in a larger proportion of the requirements of these foreign consumers being supplied from home orchards.

FRENCH PACT FAVORS U. S. FARM PRODUCTS

Fresh Apples and Pears Will Receive Important Concessions Under Trade Pact With France

Concessions of material importance to American agriculture are contained in the trade agreement between the United States and France which becomes effective June 15.

Under this agreement the United States obtained duty reductions on milled rice, prunes, raisins, canned asparagus, canned pineapple, and grapefruit, and the continuation of the existing duties on other dried fruits. In addition, the United States is granted the best treatment accorded the products from other countries for all agricultural products except rough rice, and American products will not be subjected to internal taxes or fees higher than those assessed on like French domestic products. Also, the United States is assured of improved treatment in connection with import quotas for agricultural products and the guaranteed purchase of a specified quantity of American leaf tobacco.

French Market Important

The importance of the French concessions to American farmers is indicated by the fact that France is the third largest European importer of American agricultural products and the sixth largest in the world.

Under the agreement France agrees to buy at least 20,500,000 pounds of American leaf tobacco in 1936 and to expend for this tobacco at least 48,568,000 francs. At the current rate of exchange, this expenditure would permit the purchase by France of approximately 24,000,000 pounds. This compares with French purchases of American leaf tobacco in 1935 of only 18,980,000 pounds valued at 45,155,000 francs.

Concessions on Fruits

The Foreign Agricultural Service of the Bureau of Agricultural Economics explains the concessions on fruits and vegetables in part as follows:

One of the most important concessions obtained by the United States was an adequate and assured import quota for fresh apples and pears. The duties and license taxes were not changed; but protection has been secured against any increases in either except that license taxes may be increased during the period July 1 to October 31 for pears, and from July 1 to November 30 for apples, such increases being limited to 50 percent of the present rates. In addition to the present annual allocation of 259,425 quintals (1,191,517 bushels) the United States has obtained a supplementary annual quota of 134,355 quintals (617,081 bushels). The French Government has reserved the right to adjust the supplementary quota in accordance with French production of fresh fruits. The supplementary quota may be reduced by 60 percent in any one quarter with the provision that this reduction will be restored during subsequent quarters and before the end of the following crop year. (The French crop year begins Oct. 1.) The amounts restored, however, must be apportioned among the various quarters of the year in proportion to the quarterly quotas allotted the United States under the agreement.

Furthermore, but subject to agreement between the two Governments, the French Government may increase the United States quota during a year when French domestic production is short. The amount of the increase may be subtracted from the quotas during subsequent quarters also on the same proportional quarterly basis. Imports of American apples and pears have shown a considerable increase over the past several years. Direct net imports were 55,266 quintals (253,000 bushels) in 1929 and the average direct imports during the years 1933–35 were 308,060 quintals (1,415,000 bushels).

Aid to Dried Fruits

Concessions were also granted the United States on prunes, raisins, and other dried fruits and assurance of tariff stability secured. The former duty rates were 166.4 francs per 100 kilograms (4.98 cents per pound) for prunes the count of which is 80 or less for 500 grams (1.1 pounds) and for prunes in boxes or cases regardless of size, and 124.8 francs per 100 kilograms (3.73 cents per pound) for other prunes. The new duties under the agreement are 165 and 123 francs per 100 kilograms (4.93 and 3.68 cents per pound, respectively). In addition, however, the French Government has reduced the turnover tax on prunes from 6 percent of the landed duty-paid value to 2 percent. Practically all of the French imports of prunes come from the United States. The 1935 im-

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FRENCH AGREEMENT

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ports totaled 29,823,000 pounds, an increase of 2,645,000 pounds but still substantially below imports in 1929.

Under the French tariff schedule, raisins of the Corinth or Smyrna type imported for pastry, pay a duty of 40 francs per 100 kilograms (1.2 cents per pound), whereas other raisins pay a duty of 78 francs (2.33 cents per pound). Heretofore, it had not been definitely established whether Thompson seedless raisins (which constitute about 96 percent of our raisin exports to France) came under this classification. The present agreement definitely provides that Thompson seedless raisins will be admitted at the lower rate of duty. French imports of United States raisins have shown an upward trend in recent years, imports in 1935 totaling 6,060,000 pounds compared to less than 4,600,000 pounds in 1934 and 4,000,000 pounds in 1929.

France has agreed to continue the existing import duties on other dried fruits, including peaches, apricots, apples, and pears. This must be considered an important concession because French imports of these products from the United States have been increasing rather rapidly, an indication that existing duty rates are not unduly high. It should be noted that there has been considerable agitation in France during the past year to increase the duties on these products. French imports of American dried fruits were valued at $3,711,000 in 1929 and $3,906,000 in 1935. As unit values in 1935 were lower than in 1929, there was obviously a substantial increase in the volume of this trade. The largest increases occurred in raisins and in dried peaches and apricots.

Canned Goods Helped

The United States also obtained a concession on preserved pineapple without sugar, including canned fruit salad containing 5 percent or more of pineapple. The duty was reduced from 300 to 285 francs per 100 kilograms (from 6.22 cents to 5.98 cents per pound) with assurance against an increase. In addition, the turnover tax has been reduced from 6 percent to 2 percent of the landed duty-paid value on bulk pineapple but remains unchanged at 4.6 percent for pineapple in air-tight containers.

Canned asparagus is another important item on which the United States obtained a concession, the duty being reduced from 300 to 285 francs per 100 kilograms (from 8.97 cents to 8.52 cents per pound) with assurance against an increase. Imports of canned asparagus from the United States were valued at $363,000 in 1929, but the trade increased to $581,000 in 1935. In the latter year, approximately 27 percent of the United States exports of canned asparagus went to France.

France granted the United States a concession on oranges and grapefruit. The concession on oranges consists of the granting of an import quota for the United States based on our percentage share of French imports of oranges in 1934. Prior to the agreement, no separate import quota was allotted the United States.

In addition, the French have reduced the duty on grapefruit (imports of which are not limited by quota) from 100 francs per 100 kilos to 50 francs (from 3.0 to 1.5 cents per pound). It is interesting to note that French imports of American grapefruit in 1935 are estimated at nearly 5 times the volume imported in 1929. A further increase in business is looked for as a result of the duty reduction.

PACT WITH FINLAND OFFERS FARM GAINS

Trade Agreement Lowers Import Duties on Lard and Fruits Received From United States

Reductions in the Finnish import duties on lard, fresh apples, and grapefruit, prunes, raisins, and other dried fruit, and certain canned fruits and vegetables are contained in the trade agreement signed May 18 between the United States and Finland. Existing relatively low duties on fresh pears and cornstarch were bound against increase, while cotton was bound on the Finnish free list. The new rates will become effective when the treaty is ratified by the Finnish Parliament.

The Finnish duty on lard, reduced under the agreement from about 6 cents to 4 cents per pound, applies to annual imports up to 2,205,000 pounds of United States lard. Finnish imports of lard from all sources in 1929 amounted to 6,284,000 pounds of which the United States share was at least (direct imports) 4,978,000 pounds. Preliminary returns for 1935 indicate that in that year lard imports into Finland amounted to only 150,000 pounds. Assuming that all of the small 1935 imports were United States lard, the average imports from the United States in 1934 and 1935 work out at about 2,114,000 pounds. United States statistics show that exports of lard to Finland in 1929 amounted to 7,200,000 pounds to 2,188,000 pounds in 1934, and about 25,000 pounds in 1935. The agreement places no limitation on the quantity of lard that may be imported at the regular rate of about 6 cents per pound.

Reductions on Duties

Reductions in duties granted to the United States by Finland on fruits are explained by the Foreign Agricultural Service of the Bureau of Agricultural Economics in part as follows:

The reduced rate of about 1.5 cents per pound for American apples will apply to fruit imported during the period December 15–June 15 of each year. The new figure represents a reduction of nearly 4.5 cents per pound in the period December 15–December 31, and a cut of about 1.5 cents for the period January 1–June 15. Finnish imports of United States apples amounted to 90,000 bushels in the calendar year 1929, when the duty was about 2.5 cents. In 1932, when a rate of nearly 6 cents applied the year round, imports of apples from the United States amounted to only 29,000 bushels. The period during which the lowered duty operates will permit entries to be made in time to participate in the Christmas holiday trade. For pears, the present duty of about 1 cent per pound is bound by the agreement, while the duty on grapefruit of about 1 cent per pound has been cut in half.

Duty reductions of about 50 percent from pre-agreement rates are provided for the leading American dried fruits entering Finland. The reductions apply to prunes, raisins, dried pears, apricots, and peaches. A similar concession was granted on mixed dried fruit for salad which does not contain more than 15 percent of dried apples.

The rate on prunes is reduced by the agreement to about 0.7 cent per pound from the former rate of 1.37 cents. The United States is consistently the principal supplier of prunes to Finland. In 1928 Finland imported directly 4,636,000 pounds of American prunes, and 2,681,000 pounds in 1934. The agreement reduces the duty on raisins from 1 cent to 0.5 cent per pound. Finland regularly absorbs considerable quantities of raisins from the United States. On the other dried fruits affected by the agreement, the reduction of 50 percent in the duty places the new rate at about 3 cents per pound. This represents a return to the rates in effect in 1930 and 1931, when imports of all such fruits into Finland amounted to between 770,000 and 830,000 pounds. Imports decreased under the 6-cent duty to 295,000 pounds in 1932. The United States normally supplies about 90 percent of the total imports of these items.

The items in the canned-fruit group upon which concessions were granted are pineapples, pears, peaches, apricots, grapefruit, and mixed fruit. The United

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BOSTON MILK ORDER

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scope of the Supreme Court's decision in that case.

The Government's arguments on the question of the constitutionality of the marketing agreement and order provisions centered around seven points as follows:

1. Neither the purpose nor the effect of the act and order is the control of production.
2. The defendants herein are subject to the provisions of the order since their transactions are in the current of interstate commerce or directly affect such commerce.
3. The provisions with respect to price regulation are a valid exercise of the power of Congress to regulate commerce among the several States.
4. The regulation of the price of milk moving in interstate commerce involves no infringement of the rights guaranteed by the due-process clause of the fifth amendment.
5. The price-regulating provisions of the act and order do not involve any unconstitutional delegation of legislative power.
6. The provisions respecting the equalization pool are constitutional.
7. The provisions respecting the deduction for administrative expenses are constitutional.

BUTTER SUBSIDY PLANS TROUBLE FOREIGN LANDS

Australia Turned From One Export Subsidy Plan to Another in Efforts to Move Butter to Markets

[*This is the fourth of a series of articles on world trade in butter as it relates to butter production and marketing in the United States*]

While butter-importing countries have been restricting imports of butter and limiting the markets for dairy products from surplus-producing countries, exporting countries have resorted to export bounties and other methods in an effort to stimulate exports or to raise domestic prices.

Among the countries adhering to a policy of subsidizing exports of butter are Australia, Denmark, Estonia, Finland, Latvia, Netherlands, and Sweden. New Zealand, the second largest world exporter of butter, does not have a butter export subsidy plan in operation at the present time.

The following summarizes the export subsidy programs in effect for butter in Australia:

The Paterson plan was in effect in Australia during the period 1925 to April 1934. Under this plan Australian butter producers were assessed on the basis of the volume of butter produced, the proceeds from these assessments being used to pay a bounty to exporters of butter. The plan was operated by the dairy industry without Government aid. At the time the plan was put into operation, only about one-third of the Australian butter output was exported. Since the effect of the plan was to raise domestic prices (paid on two-thirds of the output) above world prices by approximately the amount of the bounty, it appears that a gain resulted for a time from the operation of the plan.

The profitableness of this was directly affected by the relationships between the volume of domestic consumption and the volume of exports. As a result of the increased returns to butter producers due to the operation of the plan, production was stimulated, which tended to increase the proportion of the domestic output exported. This necessitated larger assessments and resulted in smaller benefits. Attempts to curb production were made by reducing the bounty from time to time, thus lowering the domestic price. The effectiveness of the plan was further reduced through the refusal of certain factories to meet the assessment and through the increase of farm-made butter exempt from the assessment.

New Plan Adopted

On May 1, 1934, a new plan was put into effect, under which uniform domestic prices are established. The price was originally fixed at 140 shillings per hundredweight of 112 pounds. The entire output of butter is pooled, and the losses incurred in selling butter in foreign markets at lower prices are spread among all producers. The plan is administered by the Commonwealth Produce Equalization Committee, Ltd., the organization of which is provided for in the legislation setting up this program. Under the provisions of this program, a total domestic allotment based on Australia's domestic requirements is determined. The total allotment is apportioned among the various States and each State is required to export a given percentage of its production. In the event the consumption in any State is above the anticipated requirements so that a smaller proportion is exported, the State Stabilization Committee is required to pay to the Commonwealth Committee the excess returns derived from that portion of the local sales which was intended for export. In States where the local consumption falls below the allotted requirement so that a larger proportion is exported, the Stabilization Committee receives a payment from the equalization fund.

The new legislation provided also for a referendum of dairy farmers on the question of whether they want the new plan to remain in force. This had to be taken within 6 months after the act became effective. The referendum was held on October 11, 1934, the results of which were favorable to the plan.

As a result of the above measures, the United States Treasury has imposed, since 1928, a countervailing duty in addition to the 14-cent statutory duty, on imports of Australian butter into the United States. The rate of the additional duty at present is 4½ pence.

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it is difficult to tell whether farmers anticipated the program in reporting their intentions.

Production Trends

Milk production per cow so far this year has ranged from about 4 to 6 percent above and total milk production probably from 2 to 5 percent above the relatively low levels of the early part of 1935. Production of manufactured dairy products during the first quarter of 1936 was 7.6 percent greater than in the corresponding period in 1935 when feeds were scarce. In view of the favorable pasture conditions last year, dairy production during the coming pasture season is not expected to show such a relative increase over the corresponding season in 1935.

Compared with the usual seasonal variation in dairy products prices, winter prices appear to have been high relative to summer prices during the last 2 years. The decline in butter and cheese prices from March to April this year was about the same as the usual seasonal decline.

According to the various indices of general business conditions, employment, and national income, there has been a substantial improvement in consumer incomes during the last year. Available evidence relative to prices and apparent consumption of fluid milk and manufactured dairy products appears to indicate an increase in demand for those products over a year ago.

Variations in prices of the principal manufactured dairy products tend to correspond fairly closely except for brief periods. Relative to the prospective butter price situation, the Bureau of Agricultural Economics reports, "Even though prices of butter in April were less than a year earlier, and prospects are for a relatively large production, it seems probable that butter prices during the coming summer will average higher than in the summer of 1935. The higher level of employment and payrolls, prospects of a good demand for storage, and the fact that butter prices have been unusually low in relation to the general level of commodity prices are the factors indicating higher prices."

Amendments to Boston Milk Plan Tentatively Approved

Amendments to the Federal program now in effect in the Boston, Mass., milk marketing area have been tentatively approved by the Secretary of Agriculture.

The principal provision of the amendments involves a reduction of 46 cents per hundredweight in the price which handlers would pay producers for class 1 milk, and an increase of 5 cents per hundredweight in the price which handlers would pay producers for class 2 milk.

The amendments apply to the marketing agreement for the Boston marketing area, which was tentatively approved by the Secretary of Agriculture January 18. The milk marketing program in Boston is in effect under the provisions of an order which embodies the provisions of this agreement. Before the amendments can become effective, the Secretary of Agriculture must determine that issuance of an order containing the amendments is favored by two-thirds of the producers by number, or by producers of two-thirds of the volume of milk produced for the Boston market.

CALIFORNIA AGREEMENT

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The major provisions of the agreement and order relate to: (1) Limitation of the shipment of any grade or size of fruit; (2) limitation of total shipments by periods within the marketing season; and (3) regulation of daily shipments by control of shipments from railroad concentration points, precooling cold storage concentration points, or shipping points by means of allotments to shippers. The manner of regulation is to be chosen by the shippers, and all three methods of control may be operated simultaneously.

PACT WITH FINLAND

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States supplies the major share of the imports into Finland. They are not itemized in the Finnish statistics, but United States export figures show that Finland took about $11,000 worth of these fruits in 1929, and little more than $5,000 worth in 1934. This decline occurred under a duty of about 10 cents per pound which sometimes has amounted to more than 90 percent ad valorem. The new rate is about 6.5 cents per pound. A similar reduction has been secured on canned asparagus.

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